

**Employee Status Update to Permanent at Completion of In-training
Appointment**

PA40

Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
4/5/2005	Chylynn Hansel	Document Draft
4/7/2005	Teresa Dillon	SME Review
4/14/2005	Chylynn Hansel	Document Draft Revision
4/18/2005	Teresa Dillon	SME Review
4/29/2005	Chylynn Hansel	Edits
4/29/2005	Teresa Dillon	Review
5/9/2005	Heather Hanson	Training Team Review
6/28/2005		Agency Review
7/7/05	Mike Murray	Internal Review
7/8/05	Chylynn Hansel	Edits

Purpose

Use this procedure to update employee **status** to **permanent** at the completion of an In-Training Probationary Appointment period.

Trigger

Perform this procedure when an employee completes an in-training probationary period.

Prerequisites

- Completed In-Training Appointment

Menu Path










Human Resources → Personnel Management → Administration → HR Master Data → Personnel Action

Transaction Code

PA40

Helpful Hints

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error 	Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to proceed.
Warning 	Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to proceed.
Confirmation  or 	Example:  Save your entries. Action: Perform the required action to proceed.

Related Procedures:

[Appointment Change after In-training Appointment](#)

Procedure


1. Start the transaction using the above menu path or transaction code **PA40**.

Personnel Actions

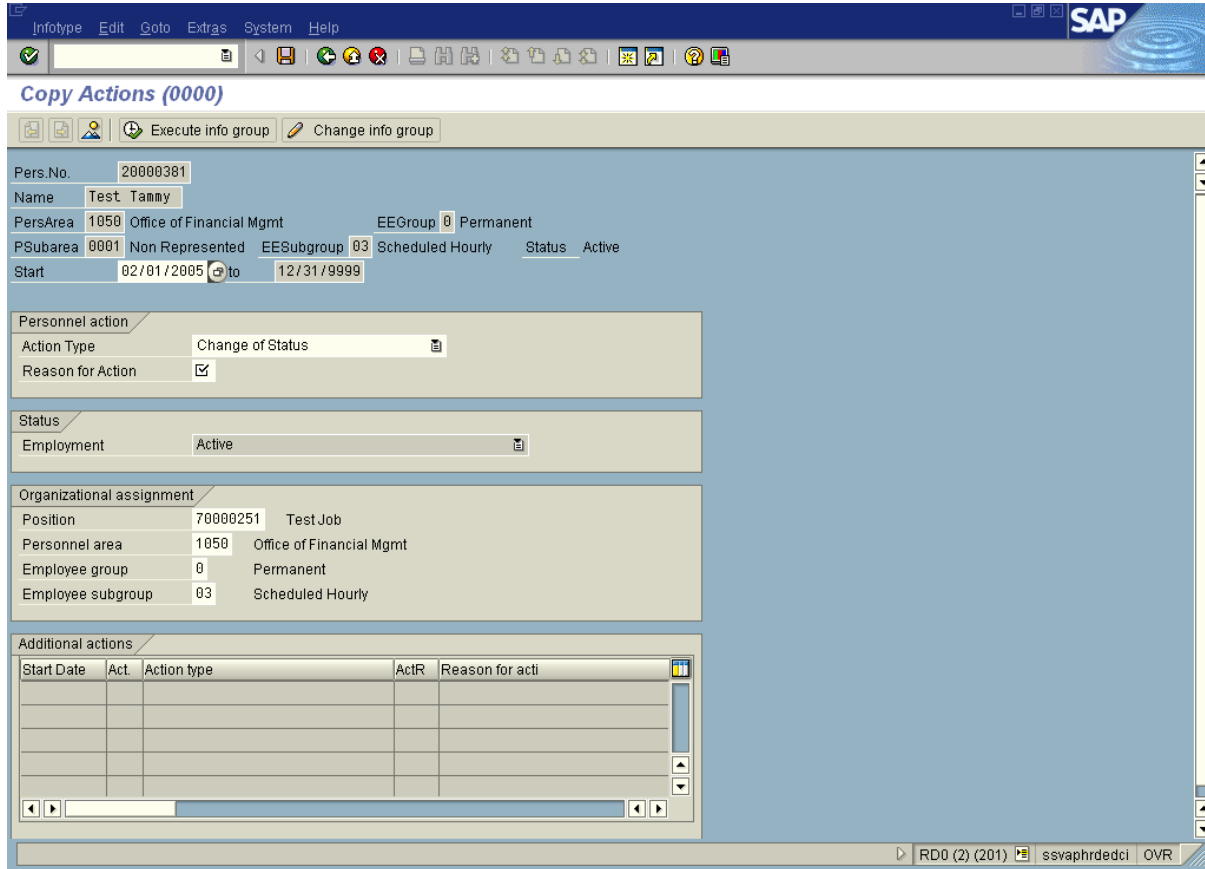
2. Complete the following fields:

Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. Example: 20000381
From	R	The start date of a record. Example: 2/1/2005

3. Click the gray box to the left of **Change of Status** to select.

4. Click  (Execute) to execute a process or action.


Copy Actions (0000)



The screenshot shows the SAP 'Copy Actions (0000)' transaction. The top bar includes the SAP logo and standard menu options. Below the title bar, there are buttons for 'Execute info group' and 'Change info group'. The main area is divided into several sections: 'Personnel action' with fields for 'Action Type' (set to 'Change of Status') and 'Reason for Action' (checked); 'Status' with 'Employment' set to 'Active'; 'Organizational assignment' with fields for 'Position', 'Personnel area', 'Employee group', and 'Employee subgroup'; and 'Additional actions' which is a table with columns for 'Start Date', 'Act.', 'Action type', 'ActR', and 'Reason for acti'. The bottom status bar shows 'RD0 (2) (201)' and 'ssvaphrdedci OVR'.

5. Complete the following field:

Field Name	R/O/C	Description
Reason for Action	R	The reason that an action has been performed. Example: 04 Non-Perm to Permanent

6. Click  (Matchcode) to open the selection list.

Reason for Action (2) 4 Entries Found

Reason for Action (2) 4 Entries Found

Restrictions

Action Type: UJ
Name of action type: Change of Status

Ac...	Name of reason for action
02	Complete In-Training Level
03	Complete In-Training Series
04	Non-Perm to Permanent
05	Transitional Review Complete

4 Entries Found

7. Click 04 Non-Perm to Permanent to select.

8. Click  (Continue) to Continue.

Title: Employee Status Update to Permanent at Completion of In-training Appointment

Processes :

Sub-Processes :

HRMS Training Documents

Copy Actions (0000)


The screenshot shows the SAP 'Copy Actions (0000)' screen. The top bar includes the SAP logo and standard menu options. Below the title bar, there are buttons for 'Execute info group' and 'Change info group'. The main area is divided into several sections:


- Pers. No.:** 20000381
- Name:** Test Tammy
- PersArea:** 1050 Office of Financial Mgmt
- EEGroup:** 0 Permanent
- PSubarea:** 0001 Non Represented
- EESubgroup:** 03 Scheduled Hourly
- Status:** Active
- Start:** 02/01/2005 to 12/31/9999

Below these fields are sections for 'Personnel action', 'Status', and 'Organizational assignment':

- Personnel action:** Action Type: Change of Status; Reason for Action: 04 Non-Perm to Permanent
- Status:** Employment: Active
- Organizational assignment:** Position: 70000251 Test Job; Personnel area: 1050 Office of Financial Mgmt; Employee group: 0 Permanent; Employee subgroup: 03 Scheduled Hourly

At the bottom, there is an 'Additional actions' table with columns: Start Date, Act, Action type, ActR, and Reason for acti. The table is currently empty. A status bar at the very bottom indicates 'Record valid from 01/01/2005 to 12/31/9999 delimited at end' and shows 'RD0 (1) (201)' and 'ssvaphrddci INS'.

9. Click  (Enter) to validate the information.

10. Click  (Save) to save.

Copy Organizational Assignment (0001)

11. In the **Contract** field, click (Dropdown) to select from the drop-down list.

12. Click **Trial Service**.

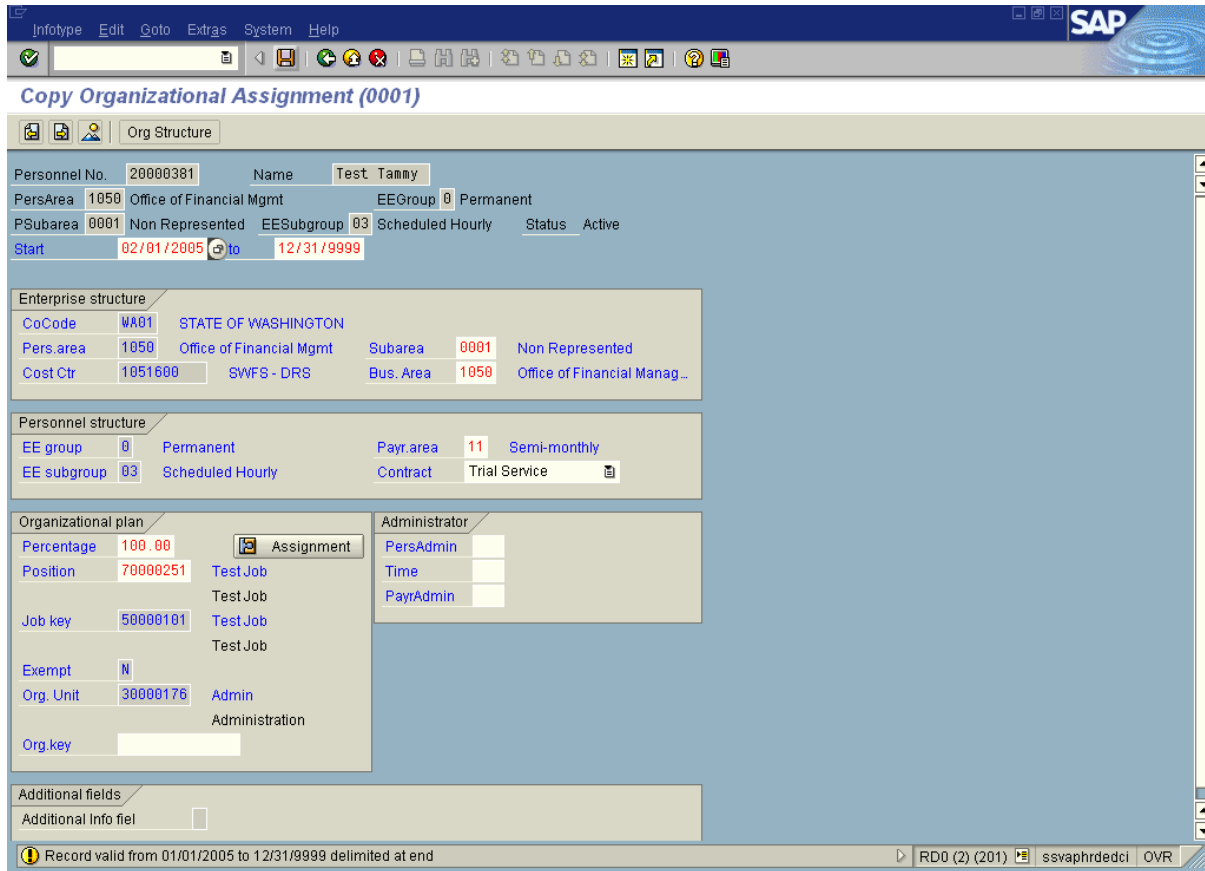


The employee has completed the In-Training Probationary appointment at the lower job class level. The employee must now serve a Trial Service appointment in the new job class.

13. Perform one of the following:

If	Then
The In-Training plan is multi-tiered	Click InTrng/Trl Srv from the drop-down list in the Contract field.
The employee has successfully completed the In-Training Appointment	Click Trial Service from the drop-down list in the Contract field.

Copy Organizational Assignment (0001)




The screenshot shows the SAP 'Copy Organizational Assignment (0001)' transaction. The interface includes a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar with various icons. The main data area contains the following fields:


- Personnel No.:** 20000381, **Name:** Test, Tammy
- PersArea:** 1050, **Office of Financial Mgmt:** EEGroup 0 Permanent
- PSubarea:** 0001, **Non Represented:** EESubgroup 03 Scheduled Hourly, **Status:** Active
- Start:** 02/01/2005 to 12/31/9999

Below the main data area are three expandable sections:

- Enterprise structure:** CoCode WA01 STATE OF WASHINGTON, Pers.area 1050 Office of Financial Mgmt, Subarea 0001 Non Represented, Cost Ctr 1051600 SWFS - DRS, Bus. Area 1050 Office of Financial Manag...
- Personnel structure:** EE group 0 Permanent, Payr.area 11 Semi-monthly, EE subgroup 03 Scheduled Hourly, Contract Trial Service
- Organizational plan:** Percentage 100.00, Position 70000251 TestJob, Job key 50000101 TestJob, Exempt N, Org. Unit 30000176 Admin, Org.key (empty)

At the bottom, there is an 'Additional fields' section with 'Additional Info field' and a status bar indicating 'Record valid from 01/01/2005 to 12/31/9999 delimited at end'.

14. Click  (Enter) to validate the information.

15. Click  (Save) to save.

Copy Contract Elements (0016)

Personnel No. 20000381 Name Test Tammy

PersArea 1050 Office of Financial Mgmt EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 03 Scheduled Hourly Status Active

Start 02/01/2005 to 12/31/9999

Contractual regulations

Contract type Non-Permanent

Periods

Probationary period 6 Months

16. In the **Contract type** field, click (Dropdown) to select from the drop-down list.

17. Click **Permanent** from the dropdown list.



The Employee has completed his/her probationary appointment and is now permanent. The Contract Type must be changed to permanent.

18. Click in the **Probationary period** field.



The probationary period field is also used for Trial Service period.

19. Enter **6 Months** for the length of Trial Service.



The length of Trial Service may be longer or shorter than 6 months.

Contract Elements (0016)

Infotype Edit Goto Extras System Help

Copy Contract Elements (0016)

Personnel No. 20000381 Name Test Tammy

PersArea 1050 Office of Financial Mgmt EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 03 Scheduled Hourly Status Active

Start 02/01/2005 to 12/31/9999


Contractual regulations

Contract type Permanent

Periods

Probationary period 6 Months

Record valid from 01/01/2005 to 12/31/9999 delimited at end RD0 (1) (201) ssvaphrddci INS

20. Click  (Enter) again to validate the information.

21. Click  (Save) to save.

Create Monitoring of Tasks (0019)

The screenshot displays the SAP 'Create Monitoring of Tasks (0019)' transaction. The interface includes a search bar on the left with options like 'Collective search help', 'Search term', and 'Free search'. The main area contains fields for Personnel No. (20000381), Name (Test Tammy), PersArea (1050), Office of Financial Mgmt, EEGroup (0), Permanent, PSubarea (0001), Non Represented, EESubgroup (03), Scheduled Hourly, and Status (Active). Below these are sections for Task (Task Type: Prob per to expire, Date of Task: 08/1/2005, Processing Indicator: New task) and Reminder (Reminder Date: 7/1/2005, Lead/follow-up time).

22. Complete the following fields:

Field Name	R/O/C	Description
Task Type	O	The relevant task that a user would be expected to perform. Example: Trial Service expire
Date of Task	O	The date on which the task needs to be completed. Example: 08/1/2005
Processing indicator	O	An indicator that signifies if a task is new, in process, or has been completed. Example: New task
Reminder Date	O	The reminder date of the task. Example: 07/01/2005
Lead/follow-up time	O	The amount of lead/follow-up time for the task. Example: 1 Month

Create Monitoring of Tasks (0019)

Personnel No. 20000381 Name Test, Tammy

PersArea 1050 Office of Financial Mgmt EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 03 Scheduled Hourly Status Active

Task


Task Type Trial Service expire


Date of Task 08/1/2005 Processing indicator New task

Reminder

Reminder Date

Lead/follow-up time 1 Months

23. Click  (Enter) to validate the information.

24. Click  (Save) to save.

25. You have completed this transaction.

Result

You have updated the employee status to permanent at the completion of an In-Training appointment.



You must now complete an appointment change action. Please see procedure: [Appointment Change after In-training Appointment.](#)